

HOW TO... Manage a project

Managing projects properly at the outset can save hours later. The trickiest tasks are simple with Works' organisational tools, as Simon Williams explains

Each of the modules in Microsoft Works is a powerful application in its own right, but when you work with them together you gain the full benefit of its integration. One of the best ways to see this in action is when planning and running through a complete project.

The latest version of Works includes a project planner with a number of predefined project outlines. But you can develop and run your own projects, too. We're going to create and pull together documents from different parts of Works to help the launch of a new product – in this case, a book.

We've used Works 8, but this walkthrough can also be followed with Works 7 (W7).

1 If you start up the Works Task Launcher in Works 8, you'll notice a button at the top of the screen marked Projects. Click on this, and you'll see the 12 project templates provided with the program. Have a look at one or two of the templates, and you'll see that each is made up as a list of tasks that need to be performed to complete the project. Some tasks have documents attached to them, such as text pages or spreadsheets.

The first template in the list is labelled Blank Project, and that's what we're going to use here. Click on it to open a blank template. In Works 7, click on the 'Start a blank project' link.

2 Give the project a name and click on New To Do. A new task line appears; type in the name of the task and give it a date by which you must complete it to keep the project on track.

The Works project planner orders tasks chronologically; you can arrange them with the oldest or newest date first by clicking on the Due Date header at the top of the To Do list. For this reason, it doesn't matter which order you type in the To Do tasks; you can brainstorm what needs doing and sort them at the end.

3 For a book launch or similar event, you'll need to think about such things as invitations, publicity, the launch venue and refreshments. Type in all the tasks you think you'll need to complete within the project and work out when they have to be finished by. To help you, Works provides a pop-up calendar so you can select the date directly. When you add dates to the tasks in your project, Works generates reminders automatically. These pop up at the start of the days they are due.

4 As you type in the different tasks, you may want to add explanatory notes or reminders of things associated with them. The project planner provides a small window at the bottom right where you can type these notes; in W7, click on the icon next to the date. You can

WORKS PORTFOLIO AT A GLANCE

■ A great bonus with Works is the Portfolio, which you can think of as a visual clipboard. Drag snippets of text, graphics and photos into the Portfolio pane to move them easily from one application to another. The beauty of the applet is that you can view the snippets in the portfolio and they remain intact when you switch off your PC.

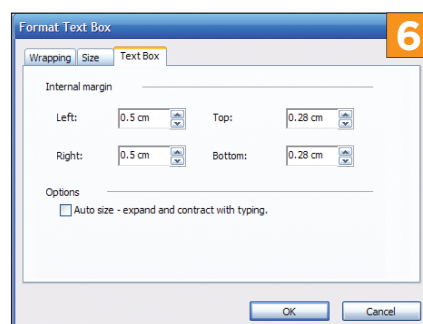
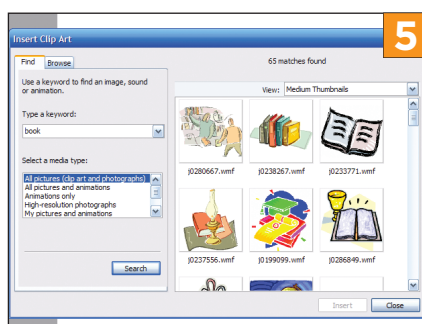
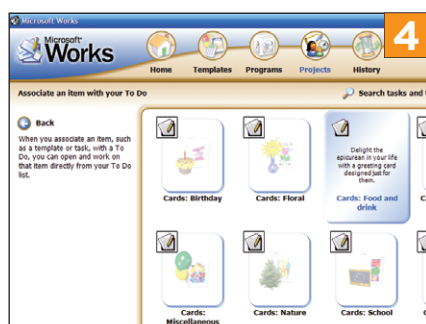
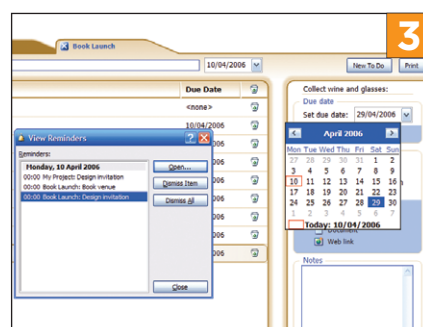
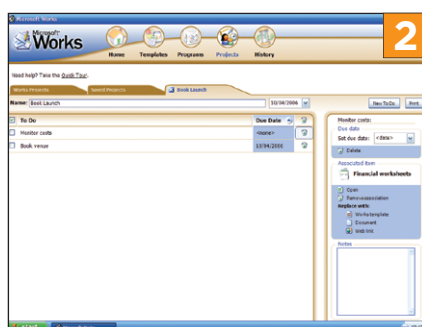
■ The Portfolio offers you the option to organise clips and snippets you use regularly by putting them into Collections. One collection could be of photos, another of useful bits of text, and a third of drawings or paintings you created. You could put all the snippets associated with a particular project into one collection if you prefer.

■ You're not limited to the modules of Works when working with the Portfolio. You can cut and paste from and to just about any application that works with a clipboard. Unfortunately, the portfolio is limited to owners of Works.

also associate an item with each task in the list and this can be a Works template, a document or a web link. In this project the most helpful will be documents, although they can be derived from Works templates.

Some tasks such as booking a venue or collecting books from the printers require only a phone call or car trip, but others will benefit from an associated document. Click on the Works template icon under Associate; in W7, click on the icon next to the Notes icon. The contents of the task are entered into the Works template search and don't always produce useful results. For example, if you try and associate a Works template with the task Design invitation, you are offered blank documents and an error message.

Click OK in the message box and overtype Design invitation in the search invitation with 'cards' to get a better selection of templates. Pick Cards: food and drink. In W7, click on the Tasks icon and enter Design Invitation in the Search Tasks box.



5 Pick the template with the Martini glass and double-click on it; there is only one choice in W7. This opens the template in the Works word processor. The idea of card templates is that you fold the page down in quarters once you've added details.

First, use clip art more appropriate to the launch. From the Insert menu select Picture then Clip art and enter 'book' in the Find tab of the clip art browser. Select one of the book images and click insert. Right-click on the image on the page and click Format object. Select Square on the Wrapping tab and click OK.

You can move the graphic around the page freely. Drag and centre the new clip over the Martini glass then delete the glass. The book will be in the right place.

6 The text of the invitation needs to be in the top left-hand corner of the page and upside down, so it appears correctly when the invitation is folded down. Create a text box by selecting Insert/Text Box. Right-click within the text box, select Format Text Box and then select Square on the Wrapping tab. Enter values of 10.5cm for the width and 14.85cm for the height on the Size tab; this makes the text box exactly a quarter of an A4 page. Set Left and Right margins of 0.5cm in the Text Box tab. Click OK and type in the text of your invitation.

7 Chose a flowery font for most of the invitation; we used Vivaldi. Pick something more sedate for the book title to make it stand out; we used Engravers MT. A size of 18pt should work well.

Finally, rotate the text box. Right-click it again, select Format Text Box and type 180 into the Rotation box on the Size tab. Click OK and save your invitation. When you return to the project planner, associate the invitation document with the task Design invitation.

8 The next big task that Works can help you with is sending out the invitations. Although the invitations aren't personalised,

you'll need a set of address labels or envelopes for them. These steps assume you have the names and addresses of the people you want to invite in the Windows Address Book already.

Go back to the Task Launcher screen and click on the Templates button, Letters and finally Labels/Return address labels; in W7, go to the Tools menu in the word processor and select Labels. You might think Mail-merge documents would be the more logical choice, but this way you cut out a couple of steps. Select Mailing labels from the next dialog, click OK and pick the brand and type of labels you'll be using from the following browser. Click New Document and select Merge from the Address Book.

9 You now have a blank document that looks like a sheet of labels and a browser offering fields from your address book. To add the fields to your label, position the text cursor where you want the field to appear, select its name in the browser and click Insert.

If you're sending to individuals at their homes, you would insert Title, First Name and Surname on the first line, Home Address, Street on the next, with Home Address, City, State or Province and Postal Code on the following lines. If you're sending to business contacts, you'd use the equivalent business address fields and include Office Location and Company Name.

10 Once the label layout is complete, you can start to merge the names and addresses into it. You probably won't want to send to everybody in your address list. Works gives you the option to select the names of contacts you want to invite. From the Tools menu, go to Mail Merge then Select Names, and a browser on to your address list will open. Click each name followed by Select as you work through the list.

When you reach the end, close the Select Names browser and you'll see a sample label with details of the first selected name.

You can browse through the selected list using the video recorder-style controls.

All that remains is to print the labels by selecting Print from the File menu. You can save the label design as a standard Works word processor document and associate it with the task Send invitations in the Project Manager.

11 To keep an eye on the cost, you need to record the ongoing costs of the publicity, venue, food and drink. You can do this by adapting a Works spreadsheet template. Go to Works Templates, Home and money, Financial worksheets and select Personal budget. Click Use this style. In W7, start Works Spreadsheet, click File, New. Select Works Spreadsheet, Financial Worksheet, Start this task and in the dialog box that appears, scroll down to Personal budget.

In the spreadsheet, delete the rows for Income and Variable expenses, keeping just those for Fixed expenses. These modifications leave the spreadsheet formulae intact. Rename the expenses section Item and the Month Amount as Cost to date. Enter expense categories, as in the screenshot. Rename the spreadsheet at the top as Launch Budget and save the modified spreadsheet. Associate the file with the task Monitor costs in the project planner.

12 Once you've created the project with all its tasks and associated documents, you can use the tick box on the left-hand side of each task row on the project screen to mark when it's complete. The project planner helpfully strikes through all the text of the task name when you tick off a task. As you save each project you create, you can use one as the

basis of another, adapting the tasks and their documents to your needs. If you have Works Suite 2006 rather than Works 8, you can bring in the other applications. Try creating invitations in Digital Image, printing directions from AutoRoute or budgeting in Money. 

EXPERT TIP

To improve the look of a spreadsheet table, use empty rows and columns as spacers; there are plenty to play with. You can adjust the row heights and column widths as needed.

